



STATE OF INDIANA

Request for Proposal RFP 12-ECPS

INDIANA DEPARTMENT OF CHILD SERVICES

**Solicitation For:
Event/Conference Planning Services**

Response Due Date: July 2, 2012

Michael Sturm, ADD Purchasing and Pricing
Purchasing and Pricing Section
302 W. Washington St., Room W306, MS 54
Indianapolis, Indiana 46204

SECTION ONE

GENERAL INFORMATION AND REQUESTED PRODUCTS/SERVICES

1.1 INTRODUCTION

In accordance with Indiana statute, including IC 5-22-9, The Department of Child Services (DCS) requires Event/Conference Planning services. It is the intent of DCS to solicit responses to this Request for Proposals (RFP) in accordance with the scope of work, proposal preparation section, and specifications contained in this document. This RFP is being posted to the DCS website (<http://www.in.gov/dcs/3151.htm>) for downloading. Neither this RFP nor any response (proposal) submitted hereto are to be construed as a legal offer.

1.2 DEFINITIONS AND ABBREVIATIONS

Following are explanations of terms and abbreviations appearing throughout this RFP. Other special terms may be used in the RFP, but they are more localized and defined where they appear, rather than in the following list.

IAC	The Indiana Administrative Code.
IC	The Indiana Code.
Full Time Equivalent (FTE)	DCS defines FTE as a measurement of an employee's productivity on a specific project or contract. An FTE of 1 would mean that there is one worker fully engaged on a project. If there are two employees each spending 1/2 of their working time on a project that would also equal 1 FTE.
Implementation	The successful implementation of Event/Conference Planning services at the Indiana Government Center as specified in the contract resulting from this RFP.
Installation	The delivery and physical setup of products or services requested in this RFP.
Other Governmental Body	An agency, a board, a branch, a bureau, a commission, a council, a department, an institution, an office, or another establishment of any of the following: (1) The judicial branch. (2) The legislative branch. (3) A political subdivision (includes towns, cities, local governments, etc.)

(4) A state educational institution

Products	Tangible goods or manufactured items as specified in this RFP.
Proposal	An offer as defined in IC 5-22-2-17.
Respondent	An offeror as defined in IC 5-22-2-18. DCS will not consider a proposal responsive if two or more offerors submit a joint or combined proposal. One entity or individual must be clearly identified as the Respondent who will be ultimately responsible for performance of the contract.
Services	Work to be performed as specified in this RFP.
State	DCS of Indiana
State Agency	As defined in IC 4-13-1, "state agency" means an authority, board, branch, commission, committee, department, division, or other instrumentality of the executive, including the administrative, department of state government.
Vendor	Any successful Respondent selected as a result of the procurement process to deliver the products or services requested by this RFP.

1.3 PURPOSE OF THE RFP

The purpose of this RFP is to select a vendor that can satisfy DCS's need for Event/Conference Planning services. DCS currently has five (5) separate events/conferences that are held annually. It is the intent of DCS to contract with vendor(s) that provide(s) quality Event/Conference Planning services.

1.4 SUMMARY SCOPE OF WORK

DCS has currently five (5) distinct events/conferences on an annual basis for many unique groups and subjects. Each event has distinct needs and requirements that will be spelled out in more detail in the Technical Proposal, Section 2.4. Respondents must bid on the Generic Event/Conference but then pick and choose which of the other event(s)/conference(s) they would like to submit a response. Respondents may choose only one or up to all five of the current event(s)/conference(s) categories along with the required Generic Event/Conference section.

The current events/conferences held by DCS on an annual basis are:

1. **Resource and Adoptive Parent Training Annual Conference (RAPT)**
This event is for 200-400 participants (foster parents, adoptive parents, relative caregivers and related professionals) during the Summer/Fall of each year. The conference is held in Indianapolis for two days. The first conference under this RFP for this program will be held in 2013.
2. **Institutes for Strengthening Families**
The Institutes are for approximately 500 participants at each of the two institutes held annually. The Institute participants are current DCS workers and current DCS Community Providers. The Institutes are held during the middle of April and the middle of September of each year. Each Institute is held in Indianapolis for three (3) days. Participants in the conference will be offered approximately thirty-five (35) to fifty (50) training sessions from which to choose during the institute that aim to provide workers with the most up to date information and addressing the current hot topics providers are seeing with families. Participants of this conference will be eligible for Continuing Education Credit as applicable. The first conference under this RFP for this program will be held September of 2013.
3. **Children's Justice Act (CJA) Annual Conference**
This event is for approximately 200-400 participants (Law Enforcement Agencies, Prosecutors Offices, Public Defenders, DCS local offices, and CAC staff) during the Fall of each year. The conference is held currently in Indianapolis for one day. DCS may change this to two conferences with one being held in the northern and southern parts of the state. Participants of this conference will be given Continuing Education Credit as applicable. The first conference(s) under this RFP for this program will be held Winter of 2014.
4. **Staff Development Workshops**
 - a. **Annual Local Office Director/Division Manager Workshop**
This event is for approximately 100 participants (DCS Local office directors and division managers) during January of each year. The conference is held in Indianapolis at the Indiana Government Center for two days. The first conference under this RFP for this program will be held January of 2015.
 - b. **Annual Supervisor Workshop**
This event is for approximately 250 participants (DCS Supervisors) during the Summer of each year. The conference is held in Indianapolis at the Indiana Government Center for two days. The first workshop under this RFP for this program will be held Summer of 2015.
5. **Older Youth Conference**
The older youth conference is a series of three (3) conferences held each year. A conference is held in the northern, southern and central portion of Indiana over

the course of one day. Each conference is held for approximately 200 participants (youth in current placements and adult) during June of each year. Adult participants of this conference may be charged a fee for participation. The first conference under this RFP for this program will be held June of 2013.

6. Generic Event/Conferences

DCS at times might have the need for a one-time or new annual event/conference. The respondents will develop pricing based on standard items for the agency to utilize during conversations with respondent when developing these events/conferences after award of the contract from this RFP.

In aggregate, DCS spends approximately \$466,000 annually on Event/Conference Planning services. Since this number is based on past usage and may fluctuate up or down, DCS is not in a position to guarantee that future spending will be at these levels. Nevertheless, the amount is provided as an aid to suppliers in responding to this RFP.

These figures are only an estimate and are not to be construed as an amount to be offered under this RFP. **However, when completing the Minority and Women's Business Enterprises participation (Attachment A) form, please use the auto-calculated total event/conference amount for year 1 from the Cost Proposal (Attachment C).**

1.5 RFP OUTLINE

The outline of this RFP document is described below:

Section	Description
Section 1 – General Information and Requested Products or Services	This section provides an overview of the RFP, general timelines for the process, and a summary of the products/services being solicited by DCS/Agency via this RFP
Section 2 – Proposal Preparation Instruction	This section provides instructions on the format and content of the RFP including a Letter of Transmittal, Business Proposal, Technical Proposal, and a Cost Proposal
Section 3 – Proposal Evaluation Criteria	This sections discusses the evaluation criteria to be used to evaluate respondents' proposals
Attachment A	M/WBE Participation Plan Form

Attachment B	Sample Contract
Attachment C	Cost Proposal Template (Budget)
Attachment D	Business Proposal Template
Attachment E	Technical Proposal Template
Attachment F	Summary of Attachments

1.6 QUESTION/INQUIRY PROCESS

All questions/inquiries regarding this RFP must be submitted in writing by the deadline of **3:00 p.m. Eastern Time on June 11, 2012**. Questions/Inquiries may be submitted via email to Michael.Sturm@dcs.in.gov and must be received by the time and date indicated above.

Following the question/inquiry due date, DCS will compile a list of the questions/inquiries submitted by all Respondents. The responses will be posted to the DCS website according to the RFP timetable established in Section 1.23. The question/inquiry and answer link will become active after responses to all questions have been compiled. Only answers posted on the DCS website will be considered official and valid. No Respondent shall rely upon, take any action, or make any decision based upon any verbal communication with any State employee.

Inquiries are not to be directed to any staff member of DCS. Such action may disqualify Respondent from further consideration for a contract resulting from this RFP.

If it becomes necessary to revise any part of this RFP, or if additional information is necessary for a clearer interpretation of provisions of this RFP prior to the due date for proposals, an addendum will be posted on the DCS website. If such addenda issuance is necessary, the DCS Purchasing and Pricing Section may extend the due date and time of proposals to accommodate such additional information requirements, if required.

1.7 DUE DATE FOR PROPOSALS

All proposals must be received at the address below by the DCS Purchasing and Pricing Section no later than **3:00 p.m. Eastern Time on July 2, 2012**. Each Respondent must submit **one original hard-copy** (marked "Original") and **one original CD-ROM (marked "Original")** and Eight (8) complete copies **on CD-ROM** of the proposal, including the Transmittal Letter and other related documentation as required in this RFP. The **original** CD-ROM will be considered the official response in evaluating responses for scoring and protest resolution. **The respondent's proposal response on this CD may be posted on the DCS website, if recommended for selection.** Each copy of the proposal must follow the format indicated in Section Two of this document. Unnecessarily elaborate

brochures or other presentations, beyond those necessary to present a complete and effective proposal, are not desired. All proposals must be addressed to:

Michael Sturm, ADD Purchasing and Pricing
Purchasing and Pricing Section
302 W. Washington St., Room W306, MS 54
Indianapolis, Indiana 46204

If you hand-deliver solicitation responses:

To facilitate weapons restrictions at Indiana Government Center North and Indiana Government Center South, as of **July 21, 2008**, the public must enter IGC buildings through a designated public entrance. The public entrance to Indiana Government Center South is located at 302 W. Washington St. (the eastern-most Washington St. entrance). This entrance will be equipped with metal detectors and screening devices monitored by Indiana State Police Capitol Police.

Passing through the public entrance may take some time. Please be sure to take this information into consideration if your company plans to submit a solicitation response in person.

If you ship or mail solicitation responses: United States Postal Express and Certified Mail are both delivered to the Government Center Central Mailroom, and not directly to the DCS Purchasing and Pricing Section. It is the responsibility of the Respondent to make sure that solicitation responses are received by the DCS Purchasing and Pricing Section at the Department of Child Service's reception desk on or before the designated time and date. Late submissions will not be accepted. The DCS Purchasing and Pricing Section clock is the official time for all solicitation submissions.

All proposal packages must be clearly marked with the RFP number, due date, and time due. Any proposal received by the Department of Child Services, Purchasing and Pricing Section after the due date and time will not be considered. Any late proposals will be returned, unopened, to the Respondent upon request. All rejected proposals not claimed within 30 days of the proposal due date will be destroyed.

No more than one proposal per Respondent may be submitted.

DCS accepts no obligations for costs incurred by Respondents in anticipation of being awarded a contract.

All proposals submitted to DCS should be double-sided, printed on 30% post-consumer recycled content paper or tree-free paper, and use soy ink, when possible.

1.8 PRE-PROPOSAL CONFERENCE

A pre-proposal conference will not be held for this RFP

1.9 MODIFICATION OR WITHDRAWAL OF OFFERS

Modifications to responses to this RFP may only be made in the manner and format described in Section 1.6 and clearly identified as a modification.

The Respondent's authorized representative may withdraw the proposal, in person, prior to the due date. Proper documentation and identification will be required before the DCS Purchasing and Pricing Section will release the withdrawn proposal. The authorized representative will be required to sign a receipt for the withdrawn proposal.

Modification to, or withdrawal of, a proposal received by the DCS Purchasing and Pricing Section after the exact hour and date specified for receipt of proposals will not be considered.

1.10 PRICING

Pricing on this RFP must be firm and remain open for a period of not less than 180 days from the proposal due date.

Please refer to the Cost Proposal sub-section under Section 2 for a detailed discussion of the proposal pricing format and requirements.

1.11 PROPOSAL CLARIFICATIONS AND DISCUSSIONS, AND CONTRACT DISCUSSIONS

DCS reserves the right to request clarifications on proposals submitted to DCS. DCS also reserves the right to conduct proposal discussions, either oral or written, with Respondents. These discussions could include request for additional information, request for cost or technical proposal revision, etc. Additionally, in conducting discussions, DCS may use information derived from proposals submitted by competing respondents only if the identity of the respondent providing the information is not disclosed to others. DCS will provide equivalent information to all respondents which have been chosen for discussions. Discussions, along with negotiations with responsible respondents may be conducted for any appropriate purpose.

The DCS Purchasing and Pricing Section will schedule all discussions. Any information gathered through oral discussions must be confirmed in writing.

A sample contract is provided in Attachment B. Any requested changes to the sample contract must be submitted with your response (See Section 2.3.5 for details). DCS reserves the right to reject any of these requested changes. It is DCS's expectation that

any material elements of the contract will be substantially finalized prior to contract award.

1.12 BEST AND FINAL OFFER

DCS may request best and final offers from those Respondents determined by DCS to be reasonably viable for contract award. However, DCS reserves the right to award a contract on the basis of initial proposals received. Therefore, each proposal should contain the Respondent's best terms from a price and technical standpoint.

Following evaluation of the best and final offers, DCS may select for final contract negotiations/execution the offers that are most advantageous to DCS, considering cost and the evaluation criteria in this RFP.

1.13 REFERENCE SITE VISITS

DCS may request a site visit to a Respondent's working support center to aid in the evaluation of the Respondent's proposal. Site visits, if required will be discussed in the technical proposal.

1.14 TYPE AND TERM OF CONTRACT

DCS intends to sign a contract with one or more Respondent(s) to fulfill the requirements in this RFP.

The term of the contract shall be variable in length and type based on the award of services and initial start date of first service to be performed.

1.15 CONFIDENTIAL INFORMATION

Respondents are advised that materials contained in proposals are subject to the Access to Public Records Act (APRA), IC 5-14-3 *et seq.*, and, after the contract award, the entire RFP file may be viewed and copied by any member of the public, including news agencies and competitors. Respondents claiming a statutory exception to the APRA must place all confidential documents (including the requisite number of copies) in a sealed envelope clearly marked "Confidential" and must indicate in the Transmittal Letter and on the outside of that envelope that confidential materials are included. The Respondent must also specify which statutory exception of APRA that applies. DCS reserves the right to make determinations of confidentiality. If the Respondent does not identify the statutory exception, the DCS Purchasing and Pricing Section will not consider the submission confidential. If DCS does not agree that the information designated is confidential under one of the disclosure exceptions to APRA, it may seek the opinion of the Public Access Counselor. Prices are not confidential information.

1.16 TAXES

Proposals should not include any tax from which DCS is exempt.

1.17 PROCUREMENT DIVISION REGISTRATION

In order to receive an award, you must be registered as a bidder with the Department of Administration, Procurement Division. Therefore, to ensure there is no delay in the award, all Respondents are strongly encouraged to complete registration prior to submission of their response. Respondents should go to www.in.gov/idoa/2464.htm to register.

1.18 SECRETARY OF STATE REGISTRATION

If awarded the contract, the Respondent will be required to register, and be in good standing, with the Secretary of State. The registration requirement is applicable to all limited liability partnerships, limited partnerships, corporations, S-corporations, nonprofit corporations and limited liability companies. Information concerning registration with the Secretary of State may be obtained by contacting:

Secretary of State of Indiana
Corporation Division
402 West Washington Street, E018
Indianapolis, IN 46204
(317) 232-6576
www.in.gov/sos

1.19 COMPLIANCE CERTIFICATION

Responses to this RFP serve as a representation that it has no current or outstanding criminal, civil, or enforcement actions initiated by DCS, and it agrees that it will immediately notify DCS of any such actions. The Respondent also certifies that neither it nor its principals are presently in arrears in payment of its taxes, permit fees or other statutory, regulatory or judicially required payments to DCS. The Respondent agrees that DCS may confirm, at any time, that no such liabilities exist, and, if such liabilities are discovered, that State may bar the Respondent from contracting with DCS, cancel existing contracts, withhold payments to setoff such obligations, and withhold further payments or purchases until the entity is current in its payments on its liability to DCS and has submitted proof of such payment to DCS.

1.20 EQUAL OPPORTUNITY COMMITMENT

Pursuant to IC 4-13-16.5 and in accordance with 25 IAC 5, it has been determined that there is a reasonable expectation of minority and woman business enterprises subcontracting opportunities on a contract awarded under this RFP. Therefore a contract goal of 8 % for Minority Business Enterprises and 8 % for Woman Business Enterprises have been established and all respondents will be expected to comply with the regulation set forth in 25 IAC 5.

Failure to meet these requirements will affect the evaluation of your proposal.

1.21 MINORITY & WOMEN'S BUSINESS ENTERPRISES RFP SUBCONTRACTOR COMMITMENT

In accordance with 25 IAC 5-5, the respondent is expected to submit with its proposal a MWBE Subcontractor Commitment Form. The Form must show that there are, participating in the proposed contract, Minority Business Enterprises (MBE) and Women Business Enterprises (WBE) listed in the Minority and Women's Business Enterprises Division (MWBED) directory of certified firms located at <http://www.in.gov/idoa/2352.htm>. If participation is met through use of vendors who supply products and/or services directly to the Respondent, the Respondent must provide a description of products and/or services provided that are directly related to this proposal and the cost of direct supplies for this proposal. Respondents must complete the Subcontractor Commitment Form in its entirety.

Failure to meet these goals will affect the evaluation of your Proposal. The Department reserves the right to verify all information included on the MWBE Subcontractor Commitment Form.

Respondents are encouraged to contact and work with MWBED at 317-232-3061 to design a subcontractor commitment to meet established goals as referenced in this solicitation.

Prime Contractors must ensure that the proposed subcontractors meet the following criteria:

- Must be listed on the IDOA Directory of Certified Firms
- Each firm may only serve as once classification – MBE or WBE
- A Prime Contractor who is an MBE or WBE must meet subcontractor goals by using other listed certified firms. Certified Prime Contractors cannot count their own workforce or companies to meet this requirement.
- Must serve a commercially useful function. The firm must serve a value-added purpose on the engagement.

- Must provide goods or service only in the industry area for which it is certified as listed in the directory at <http://www.in.gov/idoa/2352.htm>
- Must be used to provide the goods or services specific to the contract
- National Corporate Diversity Plans are generally not acceptable

MINORITY & WOMEN'S BUSINESS ENTERPRISES RFP SUBCONTRACTOR LETTER OF COMMITMENT

A signed letter(s), on company letterhead, from the MBE and/or WBE must accompany the MWBE Subcontractor Commitment Form. Each letter shall state and will serve as acknowledgement from the MBE and/or WBE of its subcontract amount, a description of products and/or services to be provided on this project and approximate date the subcontractor will perform work on this contract. DCS will deny evaluation points if the letter(s) is not attached, not on company letterhead, not signed and/or does not reference and match the subcontract amount and the anticipated period that the Subcontractor will perform work for this solicitation.

By submission of the Proposal, the Respondent acknowledges and agrees to be bound by the regulatory processes involving IDOA's M/WBE Program. Questions involving the regulations governing the MWBE Subcontractor Commitment Form should be directed to: Minority and Women's Business Enterprises Division at (317) 232-3061 or mwbe@idoa.in.gov.

1.22 AMERICANS WITH DISABILITIES ACT

The Respondent specifically agrees to comply with the provisions of the Americans with Disabilities Act of 1990 (42 U.S.C. 12101 *et seq.* and 47 U.S.C. 225).

1.23 SUMMARY OF MILESTONES

The following timeline is only an illustration of the RFP process. The dates associated with each step are not to be considered binding. Due to the unpredictable nature of the evaluation period, these dates are commonly subject to change. At the conclusion of the evaluation process, all Respondents will be informed of the evaluation team's findings.

Key RFP Dates

Activity	Date
Issue of RFP	June 1, 2012
Pre-Proposal Conference	N/A
Deadline to Submit Written Questions	June 11, 2012
Response to Written Questions/RFP Amendments	June 18, 2012
Submission of Proposals	July 2, 2012
<i>The dates for the following activities are target dates only. These activities may be completed earlier or later than the date shown.</i>	
Proposal Evaluation	TBD
Proposal Discussions/Clarifications (if necessary)	TBD
Oral Presentations (if necessary)	TBD
Best and Final Offers (if necessary)	TBD
Contract Award	October 15, 2012

SECTION TWO PROPOSAL PREPARATION INSTRUCTIONS

2.1 GENERAL

To facilitate the timely evaluation of proposals, a standard format for proposal submission has been developed and is described in this section. All Respondents are required to format their proposals in a manner consistent with the guidelines described below:

- Each item must be addressed in the Respondent's proposal.
- The Transmittal Letter must be in the form of a letter. The business and technical proposals must be organized under the specific section titles as listed below.

2.2 TRANSMITTAL LETTER

The Transmittal Letter must address the following topics except those specifically identified as "optional."

2.2.1 Agreement with Requirement in listed in Section 1

The Respondent must explicitly acknowledge understanding of the general information presented in Section 1 and agreement with any requirements/conditions listed in Section 1.

2.2.2 Summary of Ability and Desire to Supply the Required Products or Services

The Transmittal Letter must briefly summarize the Respondent's ability to supply the requested products and/or services that meet the requirements defined in Section 2.4 of this RFP. The letter must also contain a statement indicating the Respondent's willingness to provide the requested products and/or services subject to the terms and conditions set forth in the RFP including, but not limited to, DCS's mandatory contract clauses.

2.2.3 Signature of Authorized Representative

A person authorized to commit the Respondent to its representations and who can certify that the information offered in the proposal meets all general conditions including the information requested in Section 2.3.4, must sign the Transmittal Letter. **In the Transmittal Letter, please indicate the principal contact for the proposal along with an address, telephone and fax number as well as an e-mail address, if that contact is different than the individual authorized for signature.**

2.2.4 Respondent Notification

Unless otherwise indicated in the Transmittal Letter, Respondents will be notified via e-mail.

It is the Respondent's obligation to notify the DCS Purchasing and Pricing Section of any changes in any address that may have occurred since the origination of this solicitation. The DCS Purchasing and Pricing Section will not be held responsible for incorrect vendor/contractor addresses.

2.2.5 Other Information

This item is optional. Any other information the Respondent may wish to briefly summarize will be acceptable.

2.3 BUSINESS PROPOSAL

The Business Proposal must address the following topics except those specifically identified as "optional." **The Business Proposal Template is Attachment D.**

2.3.1 General (optional)

This section of the business proposal may be used to introduce or summarize any information the Respondent deems relevant or important to DCS's successful acquisition of the products and/or services requested in this RFP.

2.3.2 Respondent's Company Structure

The legal form of the Respondent's business organization, DCS in which formed (accompanied by a certificate of authority), the types of business ventures in which the organization is involved, and a chart of the organization are to be included in this section. If the organization includes more than one product division, the division responsible for the development and marketing of the requested products and/or services in the United States must be described in more detail than other components of the organization.

2.3.3 Company Financial Information

This section must include the Respondent's financial statement, including an income statement and balance sheet, for each of the two most recently completed fiscal years. The financial statements must

demonstrate the Respondent's financial stability. If the financial statements being provided by the Respondent are those of a parent or holding company, additional financial information should be provided for the entity/organization directly responding to this RFP.

2.3.4 Integrity of Company Structure and Financial Reporting

This section must include a statement indicating that the CEO and/or CFO has taken personal responsibility for the thoroughness and correctness of any/all financial information supplied with this proposal. The particular areas of interest to DCS in considering corporate responsibility include the following items: separation of audit functions from corporate boards and board members, if any, the manner in which the organization assures board integrity, and the separation of audit functions and consulting services. DCS will consider the information offered in this section to determine the responsibility of the Respondent under IC 5-22-16-1(d).

The Sarbanes Oxley Act of 2002, H.R. 3763, is NOT directly applicable to this procurement; however, its goals and objectives may be used as a guide in the determination of corporate responsibility for financial reports.

2.3.5 Contract Terms/Clauses

A sample contract that DCS expects to execute with the successful Respondent(s) is provided in Attachment B. This contract contains both mandatory and non-mandatory clauses. Mandatory clauses are listed below and are non-negotiable. Other clauses are highly desirable. It is DCS's expectation that the final contract will be substantially similar to the sample contract provided in Attachment B.

In your Transmittal Letter please indicate acceptance of these mandatory contract terms (see section 2.2.2). In this section please review the rest of the contract and indicate your acceptance of the non-mandatory contract clauses. If a non-mandatory clause is not acceptable as worded, suggest specific alternative wording to address issues raised by the specific clause. If you require additional contract terms please include them in this section. To reiterate it's DCS's strong desire to not deviate from the contract provided in the Attachment B and as such DCS reserves the right to reject any and all of these requested changes.

The mandatory contract terms are as follows:

- Authority to Bind Contractor

- Duties of Contractor, Rate of Pay, and Term of Contract
- Compliance with Laws
- Drug-free Workplace Provision and Certification
- Funding Cancellation
- Indemnification
- Governing Laws
- Non-discrimination clause
- Payments
- Penalties/Interest/Attorney's Fees
- Non-collusion and Acceptance

Any or all portions of this RFP and any or all portions of the Respondents response may be incorporated as part of the final contract

2.3.6 References

The Respondent must include a list of at least three (3) clients for whom the Respondent has provided products and/or services that are the same or similar to those products and/or services requested in this RFP. Information provided should include the name, address, and telephone number of the client facility and the name, title, and phone/fax numbers of a person who may be contacted for further information.

2.3.7 Registration to do Business

Secretary of State

If awarded the contract, the Respondent will be required to be registered, and be in good standing, with the Secretary of State. The registration requirement is applicable to all limited liability partnerships, limited partnerships, corporations, S-corporations, nonprofit corporations and limited liability companies. The Respondent must indicate the status of registration, if applicable, in this section of the proposal.

Department of Administration, Procurement Division

Additionally, respondents must be registered with the IDOA. This can be accomplished on-line at <http://www.in.gov/idoa/2464.htm>.

The IDOA Procurement Division maintains two databases of vendor information. The Bidder registration database is set up for vendors to register if you are interested in selling a product or service to DCS of Indiana. Respondents may register on-line at no cost to become a Bidder with DCS of Indiana. To complete the on-line Bidder registration, go to

<http://www.in.gov/idoa/2464.htm>. The Bidder registration offers email notification of upcoming solicitation opportunities, corresponding to the Bidder's area(s) of interest, selected during the registration process. Respondents do need to be registered to bid on and receive email notifications. Completion of the Bidder registration will result in your name being added to the Bidder's Database, for email notification. The Bidder registration requires some general business information, an indication of the types of goods and services you can offer the State of Indiana, and locations(s) within the State that you can supply or service. There is no fee to be placed in Procurement Division's Bidder Database. To receive an award, you must be registered as a bidder. Problems or questions concerning the registration process or the registration form can be e-mailed to Amey Redding, Vendor Registration Coordinator, aredding@idoa.in.gov, or you may reach her by phone at (317) 234-3542.

2.3.8 Authorizing Document

Respondent personnel signing the Transmittal Letter of the proposal must be legally authorized by the organization to commit the organization contractually. This section shall contain proof of such authority. A copy of corporate bylaws or a corporate resolution adopted by the board of directors indicating this authority will fulfill this requirement.

2.3.9 Subcontractors

The Respondent is responsible for the performance of any obligations that may result from this RFP, and shall not be relieved by the non-performance of any subcontractor. Any Respondent's proposal must identify all subcontractors and describe the contractual relationship between the Respondent and each subcontractor. Either a copy of the executed subcontract or a letter of agreement over the official signature of the firms involved must accompany each proposal.

Any subcontracts entered into by the Respondent must be in compliance with all State statutes, and will be subject to the provisions thereof. For each portion of the proposed products or services to be provided by a subcontractor, the technical proposal must include the identification of the functions to be provided by the subcontractor and the subcontractor's related qualifications and experience.

The combined qualifications and experience of the Respondent and any or all subcontractors will be considered in DCS's evaluation. The Respondent must furnish information to DCS as to the amount of the

subcontract, the qualifications of the subcontractor for guaranteeing performance, and any other data that may be required by DCS. All subcontracts held by the Respondent must be made available upon request for inspection and examination by appropriate State officials, and such relationships must meet with the approval of DCS.

The Respondent must list any subcontractor's name, address and DCS in which formed that are proposed to be used in providing the required products or services. The subcontractor's responsibilities under the proposal, anticipated dollar amount for subcontract, the subcontractor's form of organization, and an indication from the subcontractor of a willingness to carry out these responsibilities are to be included for each subcontractor. This assurance in no way relieves the Respondent of any responsibilities in responding to this RFP or in completing the commitments documented in the proposal. The Respondent must indicate which, if any, subcontractors qualify as a Minority or Women Owned Business under IC 4-13-16.5-1. See Section 1.21 and Attachment A for Minority and Women Business information.

2.3.10 Evidence of Financial Responsibility (Not required)

A response to this section will not be required by respondents.

2.3.11 General Information

Each Respondent must enter your company's general information including contact information.

2.3.12 Experience Serving State Governments

Each Respondent is asked to please provide a brief description of your company's experience in serving state governments and/or quasi-governmental accounts.

2.3.13 Experience Serving Similar Clients

Each Respondent is asked to please describe your company's experience in serving clients of a similar size to DCS that also had a similar scope. Please provide specific clients and detailed examples.

2.4 TECHNICAL PROPOSAL

The Technical Proposal must be divided into the sections as described below. Every point made in each section must be addressed in the order given. The same outline numbers must be used in the response. RFP language should not be repeated within the response. Where appropriate, supporting documentation may be referenced by a page and paragraph number. However, when this is done, the body of the technical proposal must contain a meaningful summary of the referenced material. The referenced document must be included as an appendix to the technical proposal with referenced sections clearly marked. If there are multiple references or multiple documents, these must be listed and organized for ease of use by DCS. **The Technical Proposal Template is Attachment E. Respondent must complete an Attachment E for each section being proposed in their RFP response.**

2.4.1 RESOURCE AND ADOPTIVE PARENT (RAPT) ANNUAL CONFERENCE

Conference Coordinator will manage the conference budget, vendor negotiations, establishing the facility/site for the annual conference, and contracting for all services associated with the Resource and Adoptive Parent (RAPT) Annual Conference. Conference Coordinator will attend scheduled conference planning meetings with the RAPT Conference Committee. At these meetings, the Conference Coordinator will provide an agenda of items to discuss with the Committee, which will include an update of the status of the conference (information on plenary speakers, breakout sessions, etc.). Conference Coordinator will create a timeline for critical dates and will be responsible for tracking the planning process and meeting the self-imposed deadlines within the timeline.

Conference Coordinator will report to the DCS RAPT Conference Committee the following information via weekly written reports: an accounting of registration fees income, conference related expenditures, and other items as requested by DCS.

Conference Coordinator will be responsible for collecting training materials, handouts, session presenters and keynote speaker professional biographies. Conference Coordinator will be responsible for providing annual conference attendees with training materials and handouts as appropriate for conference breakout sessions and general/plenary sessions.

The Conference Coordinator will work with the RAPT Conference Committee to develop a clear marketing message and an appropriate timeline for delivery of collateral materials as well as make suggestions

and assist in the selection of a qualified designer/supplier to design the collateral materials. All mailers, email-blasts, signs, banners and brochures will be developed with a consistent message and design. A schedule of printing needs and a timeline for creation will be developed and the Coordinator will adhere to this schedule.

The RAPT conference will be held in Indianapolis, Indiana during late Summer/early Fall for two days. Conference Coordinator will be responsible for finding, securing and negotiating a competitive rate for the facility usage. The conference generally has approximately 200-300 participants annually. If facility being utilized for the conference is a hotel, Conference Coordinator will negotiate a competitive, discounted room rate for participants and speakers.

Conference Coordinator will manage all aspects of on-site production. Conference Coordinator will be on-site during entire event to monitor activities and ensure compliance with applicable regulations and laws, satisfaction of participants, and resolve any issues that may arise.

Conference Coordinator will coordinate all necessary logistical items that will include but are not limited to, all event details, speakers including securing all keynote and workshop speakers, paying stipends and speaker's arrangements, food and beverage needs, audio/visual requirements, Volunteer/Staff needs, and Vendors/Exhibitors needs.

Conference Coordinator will develop conference sponsorships as available to help offset costs. All sponsorship opportunities must be presented to the RAPT Committee for review and approval.

Conference Coordinator will manage all participant registration, including receiving and tracking registration fees.

Conference Coordinator will handle all financial services, including managing the proposed budget, collection of registration and sponsorship fees, and creating reports to show all budgetary information as requested by DCS.

Conference Coordinator will prepare a post-conference report compiling any data received from participant satisfaction surveys and/or other sources utilized as assessment tools during the conference and submit the report to DCS.

Please respond to each of the following questions and prompts, which describe the responsibilities of the Conference Coordinator:

1. Presenter Coordination
 - Explain how you will establish written agreements with approved session presenters and keynote speakers.
 - Explain how you will secure speaker and session presenters' biographical information and presentation materials for the conference program.
 - Explain how you will secure presentation materials for the conference resource guide.
 - Explain in detail how you will work with local hotel(s) to secure a site for the conference. In addition, explain how you will facilitate the presenters' check-ins, arrange meals, and attend to any special needs.
 - Explain how you will work with local hotel to provide contact information to speakers.
 - Explain how you will aid in the processing of paperwork regarding the reimbursements of speaker and hotel expenses.
2. Overall Conference Organization
 - Explain how you will develop a timeline for critical dates and track the planning process.
 - Explain how you will recruit and train volunteers (if needed) for attendee registration, facilitating conference sessions, etc.
 - Explain how you will develop the conference program for distribution to attendees and include input from DCS.
 - Explain how you will coordinate sponsorships and exhibitors if DCS determines the need.
3. Conference Registration
 - Explain how you will coordinate and oversee the conference registration. This includes the pre-registration and on-site registration of presenters and attendees. It also includes the provision of name-tags, hand-outs, audio-visual equipment needs, evaluation forms, and other materials for presenters, attendees, session facilitators, and volunteers.
 - Explain how you will negotiate a rate with lodging facilities if necessary for attendees at or below the current "government rate".
 - Describe how the volunteers will be utilized.
4. Conference Reporting
 - Explain how you will provide written monthly report which accounts for registration data, fee reports, income and

expenditures to DCS relative to registration. Please provide an example monthly report.

- Explain how you will provide a financial closeout report. Please provide a sample of the report.
- Explain how you will provide a final conference report

5. Conference Evaluation

- Explain how you will disseminate and collect evaluations of plenary/general session and individual breakout sessions, as well as an overall conference evaluation.
- Explain how you will assemble evaluation results for DCS.
- Explain how you will work with DCS to debrief, review the planning process, and begin the planning of the next year's annual conference.

6. Presenter Reimbursement-Actual Costs

- Explain how you will contract with state-approved speaker and breakout session presenters.
- Explain how you will monitor State-approved speaker reimbursement.

The Annual Conference Coordinator must have coverage for Workmen's Compensation and have Commercial Liability with a minimum of \$5 million per occurrence.

2.4.2 INSTITUTE FOR STRENGTHENING FAMILIES

1. Presenter Coordination

- Explain how you will establish written agreements with approved session presenters, keynote speakers and approved trainers.
- Explain how you will secure speaker and session presenters' biographical information and presentation materials for the conference program.
- Explain how you will secure presentation materials for the conference resource guide and training sessions.
- Explain in detail how you will work with local hotel(s) to secure a site for the conference. In addition, explain how you will facilitate the presenters' check-ins, arrange meals, and attend to any special needs.
- Explain how you will work with local hotel to provide contact information to speakers.

- Explain how you will aid in the processing of paperwork regarding the reimbursements of speaker and hotel expenses.
2. Overall Conference Organization
 - Explain how you will develop a timeline for critical dates and track the planning process.
 - Explain how you will recruit and train volunteers (if needed) for attendee registration, facilitating conference sessions, etc.
 - Explain how you will develop the conference program for distribution to attendees and include input from DCS.
 - Explain how you will coordinate sponsorships and exhibitors if DCS and the Conference Sub-Committee determine the need.
 3. Conference Registration
 - Explain how you will coordinate and oversee the conference registration. This includes the pre-registration and on-site registration of presenters and attendees. It also includes the provision of name-tags, hand-outs, audio-visual equipment needs, evaluation forms, and other materials for presenters, attendees, session facilitators, and volunteers.
 - Explain how you will negotiate a rate with lodging facilities if necessary for attendees at or below the current “government rate”.
 - Describe how the volunteers will be utilized.
 4. Conference Reporting
 - Explain how you will provide written monthly report which accounts for registration data, fee reports, income and expenditures to DCS relative to registration. Please provide an example monthly report.
 - Explain how you will provide a financial closeout report. Please provide a sample of the report.
 - Explain how you will provide a final conference report.
 5. Conference Evaluation
 - Explain how you will disseminate and collect evaluations of plenary/general session and individual breakout sessions, as well as an overall conference evaluation.
 - Explain how you will assemble evaluation results for.
 - Explain how you will work with DCS to debrief, review the planning process, and begin the planning of the next year’s annual conference.

6. Presenter Reimbursement-Actual Costs

- Explain how you will contract with state-approved speaker and breakout session presenters.
- Explain how you will monitor State-approved speaker reimbursement.

The Annual Conference Coordinator must have coverage for Workmen's Compensation and have Commercial Liability with a-minimum of \$5 million per occurrence.

2.4.3 CHILDREN'S JUSTICE ACT (CJA) ANNUAL CONFERENCE

Conference Coordinator will manage the conference budget, vendor negotiations, establishing the facility/site for the annual conference, and contracting for all services associated with the Children's Justice Act (CJA) Annual Conference. Conference Coordinator will attend scheduled conference planning meetings with the CJA Taskforce Conference Sub-Committee. At these meetings, the Conference Coordinator will provide an agenda of items to discuss with the Taskforce, which will include an update of the status of the conference (information on plenary speakers, breakout sessions, etc.). Conference Coordinator will create a timeline for critical dates and will be responsible for tracking the planning process and meeting the self-imposed deadlines within the timeline.

Conference Coordinator will report to the DCS Liaison and the CJA Task Force Conference Sub-Committee the following information via weekly written reports: an accounting of registration fees income, conference related expenditures, and other items as requested by either DCS or the CJA Taskforce Conference Sub-Committee.

Conference Coordinator will be responsible for collecting training materials, handouts, session presenters and keynote speaker professional biographies. Conference Coordinator will be responsible for providing annual conference attendees with training materials and handouts as appropriate for conference breakout sessions and general/plenary sessions.

Conference Coordinator will also be responsible for obtaining CEU units for Conference attendees as appropriate (examples include but are not limited to: Continuing Legal Education Credit, Social Work Continuing Education, etc.).

Please respond to each of the following questions and prompts, which describe the responsibilities of the Conference Coordinator:

1. Presenter Coordination

- Explain how you will establish written agreements with approved session presenters and keynote speakers.
- Explain how you will secure speaker and session presenters' biographical information and presentation materials for the conference program.
- Explain how you will secure presentation materials for the conference resource guide.
- Explain in detail how you will work with local hotel(s) to secure a site for the conference. In addition, explain how you will facilitate the presenters' check-ins, arrange meals, and attend to any special needs.
- Explain how you will work with local hotel to provide contact information to speakers.
- Explain how you will aid in the processing of paperwork regarding the reimbursements of speaker and hotel expenses.

2. Overall Conference Organization

- Explain how you will develop a timeline for critical dates and track the planning process.
- Explain how you will recruit and train volunteers (if needed) for attendee registration, facilitating conference sessions, etc.
- Explain how you will develop the conference program for distribution to attendees and include input from DCS and the CJA Taskforce.
- Explain how you will coordinate sponsorships and exhibitors if DCS and the Conference Sub-Committee determine the need.

3. Conference Registration

- Explain how you will coordinate and oversee the conference registration. This includes the pre-registration and on-site registration of presenters and attendees. It also includes the provision of name-tags, hand-outs, audio-visual equipment needs, evaluation forms, and other materials for presenters, attendees, session facilitators, and volunteers.
- Explain how you will negotiate a rate with lodging facilities if necessary for attendees at or below the current "government rate".
- Describe how the volunteers will be utilized.

4. Conference Reporting

- Explain how you will provide written monthly report which accounts for registration data, fee reports, income and expenditures to DCS and the CJA Conference Sub-Committee relative to registration. Please provide an example monthly report.
- Explain how you will provide a financial closeout report. Please provide a sample of the report.
- Explain how you will provide a final conference report

5. Conference Evaluation

- Explain how you will disseminate and collect evaluations of plenary/general session and individual breakout sessions, as well as an overall conference evaluation.
- Explain how you will assemble evaluation results for DCS and the Conference Sub-Committee.
- Explain how you will work with the DCS and the Conference Sub-Committee to debrief, review the planning process, and begin the planning of the next year's annual conference.

6. Presenter Reimbursement-Actual Costs

- Explain how you will contract with state-approved speaker and breakout session presenters.
- Explain how you will monitor State-approved speaker reimbursement.

The following is a draft of what the Annual CJA Conference schedule might look like:

8:00-9:00 am	Registration and Coffee
9:00-10:30 am	Opening Session-Welcome and Opening Remarks Keynote Speaker
10:30-10:45 am	Break
10:45-Noon	Breakout Sessions-Multi-Disciplinary Tracks*
Noon-1:30 pm	Lunch-Keynote Speaker
1:30-2:45 pm	Breakout Sessions-Multi-Disciplinary Tracks
2:45-3:00 pm	Break
3:00-4:15 pm	Breakout Sessions-Multi-Disciplinary Tracks
4:15-5:30pm	Closing Session

*Multi-Disciplinary Tracks may include but not be limited to the following:

- Law Enforcement
- Child Protective Services and Child Welfare Family Case Managers
- Prosecution
- Medical-Doctors, Nurses, Nurse Practitioners
- Mental Health
- Victims Assistance
- Child Advocacy Centers
- Education

The Annual Conference Coordinator must have coverage for Workmen's Compensation and have Commercial Liability with a-minimum of \$5 million per occurrence.

2.4.4 STAFF DEVELOPMENT WORKSHOPS

2.4.4.A Annual Local Office Director/Division Manager

Planner works with a committee to identify appropriate presentation/workshop topics relevant to Local Office Directors and Division Manager. Planner responsible for all logistics related to the training including: registration; coordination of locations, speakers, handouts, equipment needs, marketing materials, evaluation and follow-up. Conference held at the Government Conference Center and no food is to be provided. Conference has approximately 100 attendees. There is no registration fee for attendees. Speakers obtained have been generally from DCS staff or other agencies where no fee is requested; although occasionally a speaker fee is needed.

2.4.4.B Annual Supervisor Workshop

Planner works with a committee to identify appropriate presentation/workshop topics relevant to Supervisors. Planner responsible for all logistics related to the training including: registration; coordination of locations, speakers, handouts, equipment needs, marketing materials, evaluation and follow-up. Conference held at the Government Conference Center and no food will be provided. Conference has approximately 250 attendees. There is no registration fee for attendees. Speakers obtained have generally been from DCS staff or other agencies where no fee is requested; although occasionally a speaker fee is needed.

Please respond to each of the following questions and prompts for each Workshop (2.4.4.A and 2.4.4.B), which describe the responsibilities of the Workshop Planner. Each response (2.4.4.A and 2.4.4.B) should be separate from each other in the respondent's proposal response:

1. Presenter Coordination

- Explain how you will establish written agreements with approved session presenters and keynote speakers if not current DCS staff or State agency employees.
- Explain how you will secure speaker and session presenters' biographical information and presentation materials for the workshop program.
- Explain how you will secure presentation materials for the workshop resource guide.
- Explain how you will work with local hotel to provide contact information to speakers.
- Explain how you will aid in the processing of paperwork regarding the reimbursements of speaker and hotel expenses.

2. Overall Conference Organization

- Explain how you will develop a timeline for critical dates and track the planning process.
- Explain how you will recruit and train volunteers (if needed) for attendee registration, facilitating workshop sessions, etc.
- Explain how you will develop the workshop program for distribution to attendees.

3. Workshop Registration

- Explain how you will coordinate and oversee the workshop registration. This includes the pre-registration and on-site registration of presenters and attendees. It also includes the provision of name-tags, hand-outs, audio-visual equipment needs, evaluation forms, and other materials for presenters, attendees, session facilitators, and volunteers.
- Describe how the volunteers will be utilized.

4. Workshop Reporting

- Explain how you will provide written monthly report which accounts for registration data, fee reports, income and expenditures to DCS relative to registration. Please provide an example monthly report.
- Explain how you will provide a financial closeout report. Please provide a sample of the report.

- Explain how you will provide a final conference report
5. Workshop Evaluation
 - Explain how you will disseminate and collect evaluations of plenary/general session and individual breakout sessions, as well as an overall workshop evaluation.
 - Explain how you will assemble evaluation results for DCS.
 - Explain how you will work with the DCS to debrief, review the planning process, and begin the planning of the next year's annual workshop.
 6. Presenter Reimbursement-Actual Costs
 - Explain how you will contract with state-approved speaker and breakout session presenters.
 - Explain how you will monitor State-approved speaker reimbursements.

2.4.5 OLDER YOUTH CONFERENCE

The Older Youth Initiatives Unit annually holds three (3) youth conferences throughout the State of Indiana during the month of June. The first youth conferences awarded under this RFP will take place in June 2013.

The goal of each conference is to provide pertinent information to youth who are eligible for Older Youth Services. Information presented should be youth focused and friendly. Keynote speakers and workshop presenters should be selected based on their ability to appropriately interact with the youth and involve the youth in their presentations.

The Older Youth Initiatives Unit believes to allow as many youth the opportunity to attend the conferences one should be located in the northern part of Indiana, one should be located in the Central Part of Indiana, and one should be located in the southern part of Indiana.

The attendees of the conferences could be a mixture of youth and adults. DCS expects more youth than adults. The approximate number of attendees at each conference will be around 200 people for each conference. Each conference should be one full day in length. Youth will not be expected to pay a registration fee, however, adults may be charged a nominal fee to register and attend.

The coordinator will work with a committee to identify appropriate presentation/workshop topics relevant to the attendees. The coordinator will be

responsible for all logistics related to the conference including: registration; coordination of locations, speakers, handouts, equipment needs, marketing materials, evaluation and follow-up.

Please respond to each of the following questions and prompts, which describe the responsibilities of the Conference Coordinator:

1. Presenter Coordination

- Explain how you will establish written agreements with approved session presenters and keynote speakers.
- Explain how you will secure speaker and session presenters' biographical information and presentation materials for the conference program.
- Explain how you will secure presentation materials for the conference resource guide.
- Explain in detail how you will work with local hotel(s) to secure a site for the conference. In addition, explain how you will facilitate the presenters' check-ins, arrange meals, and attend to any special needs.
- Explain how you will work with local hotel to provide contact information to speakers.
- Explain how you will aid in the processing of paperwork regarding the reimbursements of speaker and hotel expenses.

2. Overall Conference Organization

- Explain how you will develop a timeline for critical dates and track the planning process.
- Explain how you will recruit and train volunteers (if needed) for attendee registration, facilitating conference sessions, etc.
- Explain how you will develop the conference program for distribution to attendees and include input from DCS.
- Explain how you will coordinate sponsorships and exhibitors if DCS and the Conference Sub-Committee determine the need.

3. Conference Registration

- Explain how you will coordinate and oversee the conference registration. This includes the pre-registration and on-site registration of presenters and attendees. It also includes the provision of name-tags, hand-outs, audio-visual equipment needs, evaluation forms, and other materials for presenters, attendees, session facilitators, and volunteers.

- Explain how you will negotiate a rate with lodging facilities if necessary for attendees at or below the current “government rate”.
 - Describe how the volunteers will be utilized.
4. Conference Reporting
- Explain how you will provide written monthly report which accounts for registration data, fee reports, income and expenditures to DCS relative to registration. Please provide an example monthly report.
 - Explain how you will provide a financial closeout report. Please provide a sample of the report.
 - Explain how you will provide a final conference report.
5. Conference Evaluation
- Explain how you will disseminate and collect evaluations of plenary/general session and individual breakout sessions, as well as an overall conference evaluation.
 - Explain how you will assemble evaluation results for.
 - Explain how you will work with DCS to debrief, review the planning process, and begin the planning of the next year’s annual conference.
6. Presenter Reimbursement-Actual Costs
- Explain how you will contract with state-approved speaker and breakout session presenters.
 - Explain how you will monitor State-approved speaker reimbursement.

The Annual Conference Coordinator must have coverage for Workmen’s Compensation and have Commercial Liability with a-minimum of \$5 million per occurrence.

2.4.6 GENERIC EVENTS/CONFERENCES

DCS envisions that at times during the life of the contract(s) being awarded from this RFP that a one time event/conference or a new annual event/conference might need to be developed. DCS would like each respondent to provide a narrative for each point below on how the respondent would accomplish each task.

Services which could be requested of respondent to be performed

- A. Consultation on design of event
 - including its timing, location, artistic design and graphic theme and overall agenda
- B. Sponsorships
 - Negotiation of contract for sponsorship of event
 - Utilization of sponsorship fee for defraying of event cost
- C. Site Research and Contract Negotiations
 - Negotiation of contract for venue for event
 - Negotiation of contract for catering and other vendors
- D. Housing Management
 - Hotel contract negotiations
 - Ensuring availability of rooms for attendees
- E. Travel Coordination
 - Assist speakers at event with coordinating their travel utilizing State's Travel policies.
- F. On-Line Conference Registration
 - Invitation design, printing (if necessary), collection of attendee's mailing information and processing of email or paper invitation
 - System of registration
 - i. Use information from registration to build a master conference database
 - ii. Keep track of which break-out sessions registrants are planning to attend
 - Collection of registration fees
- G. Pre-Conference Logistics
 - Act as repository for staff schedules & contact info, subcontractor information, detailed specifications for all services, etc.
 - Floor plan & site map preparation, including diagrams for offices, breakout rooms, speaker ready rooms, food & beverage spaces, event spaces, poster room environments, etc.
- H. CEU credits for attendees
 - Research and obtain approval for CEU credit issuance with governing bodies as necessary
 - Tracking attendees and their eligibility for CEU
 - Provision of necessary information to governing bodies for attendees CEU credit tracking

I. On-site Conference Management

- Monitor all activities and resolve any issues that may arise

J. Management of General Sessions & Break-Out Sessions

- Design, develop and print agenda for all sessions
- Design, develop and print session description and speaker bios pamphlet for all sessions
- Manage questionnaire polling for evaluations of speakers, events and the conference as a whole

K. Food & Beverage Planning

L. Staging and Audio Visual Management

- Speaker support
- Internet Connectivity Management

M. Budget and Financial Reconciliation

- State expects Event Planner to make direct payment to all vendors and then seek reimbursement under State Agreement.

Please respond to each of the following questions and prompts, which describe the responsibilities of the Conference Coordinator:

1. Presenter Coordination

- Explain how you will establish written agreements with approved session presenters and keynote speakers.
- Explain how you will secure speaker and session presenters' biographical information and presentation materials for the conference program.
- Explain how you will secure presentation materials for the conference resource guide.
- Explain in detail how you will work with local hotel(s) to secure a site for the conference. In addition, explain how you will facilitate the presenters' check-ins, arrange meals, and attend to any special needs.
- Explain how you will work with local hotel to provide contact information to speakers.
- Explain how you will aid in the processing of paperwork regarding the reimbursements of speaker and hotel expenses.

2. Overall Conference Organization

- Explain how you will develop a timeline for critical dates and track the planning process.
- Explain how you will recruit and train volunteers (if needed) for attendee registration, facilitating conference sessions, etc.
- Explain how you will develop the conference program for distribution to attendees and include input from DCS.
- Explain how you will coordinate sponsorships and exhibitors if DCS determines the need.

3. Conference Registration

- Explain how you will coordinate and oversee the conference registration. This includes the pre-registration and on-site registration of presenters and attendees. It also includes the provision of name-tags, hand-outs, audio-visual equipment needs, evaluation forms, and other materials for presenters, attendees, session facilitators, and volunteers.
- Explain how you will negotiate a rate with lodging facilities if necessary for attendees at or below the current “government rate”.
- Describe how the volunteers will be utilized.

4. Conference Reporting

- Explain how you will provide written monthly report which accounts for registration data, fee reports, income and expenditures to DCS relative to registration. Please provide an example monthly report.
- Explain how you will provide a financial closeout report. Please provide a sample of the report.
- Explain how you will provide a final conference report

5. Conference Evaluation

- Explain how you will disseminate and collect evaluations of plenary/general session and individual breakout sessions, as well as an overall conference evaluation.
- Explain how you will assemble evaluation results for DCS.
- Explain how you will work with DCS to debrief, review the planning process, and begin the planning of the next year’s annual conference.

6. Presenter Reimbursement-Actual Costs

- Explain how you will contract with state-approved speaker and breakout session presenters.

- Explain how you will monitor State-approved speaker reimbursement.

The Annual Conference Coordinator must have coverage for Workmen's Compensation and have Commercial Liability with a minimum of \$5 million per occurrence.

2.5 COST PROPOSAL

The Cost Proposal Template is Attachment C.

DCS has determined that the annual baseline cost (not to exceed) for each Event/Conference is as follows:

1. Resource and Adoptive Parent Training (RAPT) - \$65,000 annually
2. Institute for Strengthening Families - \$72,000 per institute or \$144,000 annually
3. Children's Justice Act (CJA) - \$56,000 annually
4. Staff Development Workshops - \$6,000 annually
5. Older Youth Conference - \$65,000 per regional annual conference or \$195,000 total for all three regions, annually

Each respondent should use Attachment D, the Cost Proposal Template, to estimate a two (2) year budget for each of the services being proposed by the respondent in their response to this RFP. If a respondent desires to propose a cost that is not listed within the Attachment C please note this cost under the "Other" section of the budget with a description of the cost. After completing the template the Respondent will have proposed a "Total Program Cost." The "Total Program Cost" will be measured against the baseline cost for this contract when each proposal is evaluated. More information on how the cost proposal will be scored is provided in Section 3.

Please note that each respondent must provide a proposed list of costs for Section 2.4.6 (Generic events/conferences) with their RFP response.

2.6 BUY INDIANA INITIATIVE/INDIANA COMPANY

It is the Respondent's responsibility to confirm its Buy Indiana status for this portion of the process. If a Respondent has previously registered its business with IDOA, go to <http://www.in.gov/idoa/2464.htm> and click on the link to update this registration. Click the tab titled Buy Indiana. Select the appropriate category for your business. Respondents may only select one category. Certify this selection by clicking the check

box next to the certification paragraph. Once this is complete, save your selection and exit your account.

Respondents that have not previously registered with IDOA must go to <http://www.in.gov/idoa/2464.htm> and click on the link to register. During the registration process, follow the steps outlined in the paragraph above to certify your business' status. The registration process should be complete at the time of proposal submission.

The Respondent's Buy Indiana status must be finalized when the RFP response is submitted to the State.

Defining an Indiana Business:

"Indiana business" refers to any of the following:

- (1) A business whose principal place of business is located in Indiana.
- (2) A business that pays a majority of its payroll (in dollar volume) to residents of Indiana.
- (3) A business that employs Indiana residents as a majority of its employees.

Respondents claiming this status must indicate which of the provisions above qualifies them as an Indiana business

The following is the policy concerning items 4 & 5 described below. Appropriate documentation must be provided with your proposal response supporting either claim made below:

- (4) A business that makes significant capital investments in Indiana.
- (5) A business that has a substantial positive economic impact on Indiana.

Substantial Capital Investment:

Any company that can demonstrate a minimum capital investment of \$5 million or more in plant and/or equipment or annual lease payments of \$2.5 million or more shall qualify as an Indiana business under category #4. If an out of state company does not meet one of these criteria, it can submit documentation/justification to the State for review for inclusion under this category.

Substantial Indiana Economic Impact:

Any company that is in the top 500 companies (adjusted) for one of the following categories: number of employees (DWD), unemployment taxes (DWD), payroll withholding taxes (DOR), or Corporate Income Taxes (DOR); it shall qualify as an Indiana business under category #5. If a Respondent needs assistance in determining if its

business qualifies under this criterion, please send an email inquiry to buyindianainvest@idoa.in.gov and you will receive a response within forty-eight (48) hours. If an out of state company does not meet one of these criteria, it can submit documentation/justification to the State for review for inclusion under this category.

SECTION THREE PROPOSAL EVALUATION

3.1 PROPOSAL EVALUATION PROCEDURE

DCS has selected a group of personnel to act as a proposal evaluation team. Subgroups of this team, consisting of one or more team members, will be responsible for evaluating proposals with regard to compliance with RFP requirements. All evaluation personnel will use the evaluation criteria stated in Section 3.2. DCS will determine which proposals offer the best means of servicing the interests of DCS. The exercise of this discretion will be final.

The procedure for evaluating the proposals against the evaluation criteria will be as follows:

- 3.1.1 Each proposal will be evaluated for adherence to requirements on a pass/fail basis. Proposals that are incomplete or otherwise do not conform to proposal submission requirements may be eliminated from consideration.
- 3.1.2 Each proposal will be evaluated on the basis of the categories included in Section 3.2. A point score has been established for each category.
- 3.1.3 If technical proposals are close to equal, greater weight may be given to price.
- 3.1.4 Based on the results of this evaluation, the qualifying proposal(s) determined to be the most advantageous to DCS, taking into account all of the evaluation factors, may be selected by DCS for further action, such as contract negotiations. If, however, DCS decides that no proposal is sufficiently advantageous to DCS, DCS may take whatever further action is deemed necessary to fulfill its needs. If, for any reason, a proposal is selected and it is not possible to execute a contract with the Respondent, DCS may begin contract preparation with the next qualified Respondent or determine that no such alternate proposal exists.

3.2 EVALUATION CRITERIA

Proposals will be evaluated based upon the proven ability of the Respondent to satisfy the requirements of the RFP in a cost-effective manner. Each of the evaluation criteria categories is described below with a brief explanation of the basis for evaluation in that category. The points associated with each category are indicated following the category name (total maximum points = 100). If any one or more of the listed criteria on which the responses to this RFP will be evaluated are found to be inconsistent or incompatible

with applicable federal laws, regulations or policies, the specific criterion or criteria will be disregarded and the responses will be evaluated and scored without taking into account such criterion or criteria.

Summary of Evaluation Criteria:

Criteria	Points
1. Adherence to Mandatory Requirements	Pass/Fail
2. Management Assessment/Quality (Business and Technical Proposal)	40
3. Cost (Cost Proposal)	45
4. Buy Indiana	5
5. Minority (5) and Women Business (5) Subcontractor Commitment	10
Total	100

All proposals will be evaluated using the following approach.

Step 1

In this step proposals will be evaluated only against Criteria 1 to ensure that they adhere to Mandatory Requirements. Any proposals not meeting the Mandatory Requirements will be disqualified.

Step 2

The proposals that meet the Mandatory Requirements will then be scored based on Criteria 2 and 3 ONLY. This scoring will have a maximum possible score of 85 points. All proposals will be ranked on the basis of their combined scores for Criteria 2 and 3 ONLY. This ranking will be used to create a “short list”. Any proposal not making the “short list” will not be considered for any further evaluation.

Step 2 may include one or more rounds of proposal discussions focused on cost and other proposal elements.

Step 3

The short-listed proposals will then be evaluated based on all the entire evaluation criteria outlined in the table above.

If DCS conducts additional rounds of discussions and a BAFO round which lead to changes in either the technical or cost proposal for the short listed Respondents, their scores will be recomputed.

The section below describes the different evaluation criteria.

3.2.1 Adherence to Requirements – Pass/Fail

Respondents passing this category move to Phase 2 and proposal is evaluated for Management Assessment/Quality and Price.

3.2.2 Management Assessment/Quality - **40** points

3.2.3 Price – **45** points available

Price will be measured against DCS's baseline cost for each individual scope of works. The cost that DCS is currently paying or its best estimate will constitute the baseline cost. Cost scoring points will be assigned as follows:

- Respondents who meet DCS's current baseline cost will receive zero (0) cost points.
- Respondents who propose a decrease to DCS's current costs will receive positive points and will be awarded according to the following schedule:

%	1%	2%	3%	4%	5%	6%	7%	8%	9%	10%
Pts.	4.50	9.00	13.50	18.00	22.50	27.00	31.50	36.00	40.50	45.00

NOTE: Fractional percentages will be rounded up or down to the nearest whole percentage. (e.g. 7.49% will be rounded down to 7% = 31.50 pts., 7.50% will be rounded up to 8% = 36.00 pts.)

3.2.4 Buy Indiana Initiative – 5 points

Respondents qualifying as an Indiana Company as defined in Section 2.6 will receive 5 points in this category.

3.2.5 Minority (5 points) & Women's Business (5 points) Subcontractor Commitment - (10 points total).

The following formula will be used to determine points to be awarded based on the MBE and WBE goals listed in Section 1.20 of this RFP. Scoring is conducted based on an assigned 10 point scale (MBE: Possible

5 points, WBE: Possible 5 points). Points are assigned for respective MBE participation and WBE participation based upon the BAFO meeting or exceeding the established goals.

If the respondent's commitment percentage is less than the established MBE or WBE goal, the maximum points achieved will be awarded according to the following schedule:

%	1%	2%	3%	4%	5%	6%	7%	8%
Pts.	0.75	1.25	2.00	2.50	3.00	3.75	4.50	5.00

NOTE: Fractional percentages will be rounded up or down to the nearest whole percentage. (e.g. 7.49% will be rounded down to 7% = 4.50 pts., 7.50% will be rounded up to 8% = 5.00 pts.)